

YOUTH PROGRAMS

Toolbox 2.0 Desk Aid

Enrolling a Job Seeker in the Youth Program

To enroll a job seeker in the youth program, they need to have an active registration. Reference the Job Seeker Registration desk aid for directions on how to register a job seeker.

Updating the Job Seeker's Record

Seeker Screen - KYLE W MURPHY(### ##-5288) | No Primary Counselor Assigned

Find Seeker | Seeker Info | Des Job Title | Edu/Cert | Work History | Referrals | Other | Scratch Pad | Svc Referral | Adv. Query

Other Seeker Info

Seasonal Farm Worker: ☐ N Migrant Worker: ☐ Currently Employed: ☐ N

Citizen: ☒ Y Alien Reg Number: **1**

Refugee: ☐ N Date of Entry:

Asylee: ☐ N Date Asylum Granted:

General Information

Active: 03/11/08 **1**

Inactive:

Entered: 03/11/08 By: LINDA LOESCH

Race

☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American

☐ Native Hawaiian or other Pacific Islander ☒ White ☐ Not Declared

Ethnicity

☐ Latino/Hispanic ☒ Non Latino/Hispanic ☐ Undeclared

Additional Comments:

Kyle is interested in welding and needs training in that field.

Objective Statement:

Kyle is interested in becoming a welder, needs more training **4**

Accomplishments

5

Counts

DWD Referrals: 0 Placements: 0

Self Referrals: 0 Services: 1

Employer Referrals: 0 Scratch Pads: 0

6 Save Cancel

Description of accomplishments for electronic resume (FF)

Record: 1/1 ... <OSC>

Figure 1: Seeker Other Screen

Step-by-Step:

- 1) To update a job seeker's record, click on the "Other" tab on "Seeker Screen"
- 2) Complete the "Other Info" section of the "Other" screen.
- 3) Select the job seeker's "Race" and "Ethnicity"
- 4) Complete the "Objective Statement". This will transfer to the electronic resume.
- 5) Enter additional accomplishments in the "Accomplishments" chart, by clicking on the box.
- 6) Click on the "Save" button.

Initial Interview

The purpose of the Initial Interview is to provide a brief informal assessment of the customer's immediate needs.

Initial Interview for KYLE W MURPHY(### ## 5288) | LINDA LOESCH (573)751-2240

Initial Interview | Resource/Activities

Interview Dates: 03/12/08 Interviewer: LINDA LC + Add Copy

Presenting Situation:
Kyle is a high school senior, still in school and works part-time at McDonalds. After he graduates in May his parents are relocating to another state. Kyle wants to stay in Missouri and attend a technical school to learn to be a welder. At this time he does not have any transportation of his own. He has been using his mom's car to go to work. He does have his drivers license.


Resource/Activities:
☐ Child Care
☐ Eligibility Verifications
☐ Registration For Services (Form 61)
☐ Health Assessment - (Form 1, SSI)
☒ Housing
☐ Mental Health
☐ ORS/Legal
☐ Other
☐ Job Connection/Resume
☐ Supportive Services
☒ Transportation
☐ Veteran
☐ Voc. Assessment/Rehab
☐ Workshops
☒ Youth

Save Cancel

Records the date you complete the initial interview
Record: 1/1 <ESC>

Figure 2: Initial Interview Screen

Step-by-Step:

- 1) Click on Initial Interview  icon
- 2) The "Interview Dates" section allows the worker to create additional Initial Interview records. Click on the "Add" button to create new records. If the case manager wants to create a new record using the data from an existing record, click on the "Copy" button. The information can be modified during the day it was entered.
- 3) Summarize the customer's current situation, their family or household by clicking on the "Presenting Situation" section. Address items like marital status, members of the household living in the home, and whether the customer has dependent children. The customer's education, employment and skills also need to be addressed in this section.
- 4) Check the boxes in the "Resources/Activities" section that have been determined as issues for the customer at this point in time.

5) Click the “Save” button.

The purpose of the Initial Interview-Resource/Activities tab screen is to enter a brief description of possible resources and how the customer can access those resources. Only the boxes that were checked on the Initial Interview screen will be available to enter information, all other boxes will be protected.

The screenshot shows the 'Initial Interview-Resource/Activities' screen in the 'Toolbox 2 (Test (tbtest))' application. The window title is 'Toolbox 2 (Test (tbtest)) - Initial Interview'. The menu bar includes 'File', 'Edit', 'Navigation', 'Options', 'Utility', 'MO-Utility', 'Window', and 'Help'. The toolbar contains various icons for navigation and editing. The main area is divided into two tabs: 'Initial Interview' and 'Resource/Activities'. The 'Resource/Activities' tab is active, showing a grid of text boxes for entering information about various services. The boxes are labeled: 'Interviewer: LINDA LOE9CH', 'Child Care:', 'Mental Health:', 'Transportation:', 'Eligibility Verifications:', 'ORS/Legal:', 'Veteran:', 'Registration For Services (Form 61):', 'Other:', 'Voc. Assessment/Rehab:', 'Health Assessment:', 'Job Connection/Resume:', 'Workshops:', 'Housing:', 'Supportive Services:', and 'Youth:'. The 'Housing' box contains the text 'Will contact housing authority to see if they have an efficiency apartment available..'. The 'Youth' box contains the text 'Interested in welding. Needs training'. At the bottom of the screen, there are buttons for 'Appt', 'Task', 'Print', 'Resources', 'Save', and 'Cancel'. The status bar at the bottom shows 'Record: 1/1' and '<OSC>'. Red arrows and numbers 1 through 4 highlight specific elements: 1 points to the 'Mental Health' box, 2 points to the 'Health Assessment' box, 3 points to the 'Task' button, and 4 points to the 'Save' button.

*Figure 3: Initial Interview
Resources/Activities Screen*

Step-by-Step:

- 1) Enter brief details in every box that were determined on the Initial Interview screen as issues for the customer. The information entered should provide the customer with enough details about the resource or referrals to enable them to access the services available to them.
- 2) Click on the “Appointment” button to create an appointment for the customer to meet with another worker.
- 3) Click on the “Task” button to set a task for the customer.
- 4) Click the “Save” button.

Assessment

In order to access the Assessment Screen you will need to first go to the Seeker Information Screen to enroll the job seeker into Case Management.

ToolB - Training Database(Tbtrn) - Seeker

File Edit Migration Options Utility MO Utility Window Help

Seeker Screen - DVD TRAINERS (573)555-9863 | KIM NICHOLS (573)522-3017

Find Seeker 1 | Seeker Info | Des Job Title | Edu/Cert | Work History | Referrals | Other | Scratch Pad | Svc Referral | Adv. Query

Name and Address Information

Name: DVD | TRAINERS | Mailing Address: 1234 TRAINING LANDIN 3 | Street Address:

Phone Numbers

Home: (573)555-9632 | Cell: | Work: | Other: | JEFFERSON CITY | MO | 65101 | Email: kim.nichols@ded.mo.gov

Personal Information

Date of Birth: 01/01/1972 | Age: 36 | Gender: F | Citizen: Y | Alien Reg #: A | LEP: | In School: | Disabled: | Searchable: | Work Disabled: | Share resume: | Displ. Homemaker: | Undoc. Alien: | Deceased:

Veteran Information

Vet Status: N - None | Transition: | Served From: | Served To: | Recently Separated: | Served in Campaign: | Print on Summary (Resume): | Service Ended by Disability: | Spouse Currently Deployed in Reserves or National Guard: | Branch: | Status Verified:

Source: KIM NICHOLS | Partial Seeker: | Restricted: | Secondary Counselor:

Seeker Status

Status: Active | Date: 03/18/08 | Last Update: 03/18/08 | Case Management: Active | Next Appt: | Time: | UI Ben Year End Dt: Inactive | Next Task: | App ID: 2306386299 | DCN: | Possible/Actual Enrollments:

Services Provided



Date	Type of Service	Employment Counselor
03/18/08	Career Guidance	KIM NICHOLS

Indicates date seeker's Case Management status was last updated by an Employment Counselor.

Record: 1/1 | <OSC>

Figure 4: Seeker Screen

Step-by-Step:

- 1) Click on the Seeker icon .
- 2) Click on the "Options" tab on the tool bar, then scroll down to "Activate/Inactivate Case Management" and click on it to activate Case Management.
- 3) Click on the Assessment icon .

The Assessment Employment Tab is used to enter information about the customers work potential and barriers.

1

2

3

4

5

6

**Figure 5: Assessment
Employment Tab Screen**

Employment History Section

The “Employment History” section of the screen includes the customer’s “Employment History” that was entered on the “Seeker Employment History” screen. These records will display on the “Seeker” screen.

Step-by-Step:

- 1) To add new records, click on the “Employer” text box; enter the employer name, city and state.
- 2) Click on the “Job Title” text box, enter the job title.
- 3) Enter the “Start Date”, “End Date” and “Months” of experience.
- 4) Select the correct wage value from the drop down list. Enter a wage in the “Salary” text box and enter the number of “Hours Week”.
- 5) Enter a “Job Description” for the job that is being entered in the text box.

6) Select the correct value from the drop down list for the “Reason for Leaving”.

The screenshot shows the 'Assessment - Employment' tab in the 'Toolbox 2 (Test (tbtest)) - Assessment' application. The interface includes a menu bar (File, Edit, Navigation, Options, Utility, MO Utility, Window, Help) and a toolbar with various icons. The main content area is divided into several sections:

- Assessment Date:** 03/13/08, **Last Update Date:** (empty)
- Employment History:** A table with columns for Employer, City, and St. The first entry is McDonalds, Jefferson City, MO. There are 'Add' and 'Delete' buttons.
- Job Title:** Fry Cook
- Start Date:** 06/07, **End Date:** (empty), **Months:** (empty)
- Per:** Hourly, **Salary:** 7.00, **Hrs. Wk.:** 20
- Job Description:** Deep fryer and fry grill, cash register. Prepare enough fries so the customer does not have to wait for them. Help co-workers prepare food
- Type:** (empty), **Verified:** (checkbox)
- Reason For Leaving:** (dropdown menu, currently showing '7'), **Verified Termination:** (checkbox)
- Job Seeking Skills:**
 - Do you have a resume?** (dropdown menu, currently showing 'No')
 - Which methods worked best for you?** (text box)
 - Describe your typical interview** (text box)
 - Do you need help preparing for interviews?** (text box)
- Job Keeping Skills:**
 - Were you able to get to work on time?** (dropdown menu, currently showing 'Yes')
 - Did you work most scheduled work hours?** (dropdown menu, currently showing 'Yes')
 - Describe your working relationship with your co-workers/supervisor** (text box)
 - What type of jobs have you liked in the past and what are you interested in?** (text box)
 - Describe what you liked most about your last job** (text box)
 - Describe what you liked least about your last job** (text box)
- LMI vs. Potential Earnings:** (text box), **LMI** (button)
- Offender Status:** (dropdown menu)
- Bonding Appropriate?** (dropdown menu)

At the bottom right, there are 'Save' and 'Cancel' buttons. A status bar at the very bottom says 'Select Yes or No'.

*Figure 6: Assessment
Employment Tab Screen*

Job Seeking Skills Section

The “Job Seeking Skills” section of the screen allows the worker to enter job search skills that the seeker has.

Step-by-Step:

- 7) In the “Job Seeking Skills” section of this screen, answer the following questions by entering the information in the text boxes. The questions to be answered are: “Do you have a resume”, “Which methods worked best for you?”, “Describe your typical interview” and “Do you need help preparing for interviews?”

The screenshot shows the 'Assessment - KYLE W' window with the 'Employment' tab selected. The 'Job Keeping Skills' section is highlighted with a red box and the number 8. The 'Save' button is highlighted with a red box and the number 9. A red arrow points from the 'Job Keeping Skills' section to the 'Save' button.

Assessment - KYLE W

File Edit Navigation Options Utility MO Utility Window Help

Employment Education Support System Financial Needs Legal Screening Health/Treatment Basic Skills Tests

Assessment Date: 03/13/08 Last Update Date: []

Employment History

Employer	City	St
McDonalds	Jefferson City	MO

+ Add
- Delete

Job Title: Fry Cook
Start Date: 06/07 End Date: [] Months: 8
Per: Hourly Salary: 7.00 Hrs. Wk.: 20
Job Description: Deep fryer and fry grill, cash register. Prepare enough fries so the customer does not have to wait for them. Help co-workers prepare food
Reason For Leaving: [] Verified Termination []

Job Seeking Skills

Do you have a resume? No
Which methods worked best for you? []
Describe your typical interview []
Do you need help preparing for interviews? []

Job Keeping Skills

Were you able to get to work on time? Yes
Did you work most scheduled work hours? Yes...
Describe your working relationship with your co-workers/supervisor []
What type of jobs have you liked in the past and what are you interested in? []
Describe what you liked most about your last job []
Describe what you liked least about your last job []

LMI vs. Potential Earnings: [] LMI

Legal

Offender Status: []
Bonding Appropriate? []

9 Save Cancel

Select Yes or No

**Figure 7: Assessment
Employment Tab Screen**

Job Keeping Skills Section

The “Job Keeping Skills” section of the screen identifies skills that the jobseeker has for maintaining their employment. This section also includes an “LMI” button. The LMI button can be used to access State Labor Market Information.

Step-by-Step:

- 8) In the “Job Keeping Skills” section of this screen, answer the following questions by entering the information in the text boxes. The questions to be answered are: “Were you able to get to work on time?”, “Did you work most scheduled work hours?”, “What type of jobs have you liked in the past and what are you interested in?”, “Describe what you like most about your last job?”, “Describe what you like least about your last job?”, “LMI vs. Potential Earnings”, “Offender Status” and “Bonding Appropriate?”.
- 9) Click on “Save” button.

The Assessment Education is used to enter information about the customer's educational background. Information entered on this screen will help the worker understand the customer's educational strengths and weaknesses.

The screenshot shows the 'Assessment - KYLE W M...' window with the 'Education' tab selected. The interface includes several sections: 'Employment Skills', 'Aptitude/Ability Tests', 'Education Issues', 'Licenses and Certificates', and 'Training Completion Certificates'. Numbered callouts point to the following elements:

- 1: Employment tab
- 2: Assessment Date field
- 3: Highest grade completed dropdown
- 4: Do you have a learning disability? dropdown
- 5: What did you like about school? text box
- 6: What did you dislike about school? text box
- 7: Training Program table
- 8: Are you interested in more training or skill enhancement? dropdown
- 9: School text box
- 10: City text box
- 11: Employment Skills section header
- 12: Test Type dropdown
- 13: Test Date field
- 14: Results text box
- 15: Describe: text box under Education Issues

Figure 8: Assessment Education Tab Screen

Education History Section

The “Education History” section of the screen lists the customer’s education history. This information pre-populates from the Seeker screen. New records can be added here and will display on the Seeker screen.

Step-by-Step:

- 1) Select the “Highest grade completed” from the dropdown box.
- 2) Select “Yes” or “No” if “Currently in School”.
- 3) Select “Yes” or “No” for “Would you like to obtain your high school diploma or GED?”
- 4) Select “Yes” or “No” for “Do you have a learning disability”. If the participant has a learning disability, double click on the text box to describe the participant’s disability.
- 5) In the text box, describe what the participant “Liked about school”.
- 6) In the text box, describe what the participant “Disliked about school”.
- 7) Select “Yes” or “No” if the participant did not complete.

- 8) In the text boxes, list the “Training Program” they did not complete, the “Reasons for Leaving”, and the “Exit Date”.
- 9) Select “Yes” or “No” if the participant is “Interested in more training or skill enhancement”. In the next text box, describe what type of training they are interested in.
- 10) Additional education information may be added; to add, click on “Add” button. Enter “School” name in the new text box. Enter the “City”, “State”, and “Major”. Select the type of “Degree” from the dropdown box. Enter the “Completion Date”.
- 11) Double click in the “Employment Skills” text box to receive the List of Values to select the participant’s employment skills.
- 12) Double click in the “Aptitude/Ability Tests” text box to receive the List of Values to select the “Test Type” to enter the type of test the participant took.
- 13) Enter the “Test Date” in the text box.
- 14) Enter the participant’s scores in the “Results” text box.
- 15) If additional tests need to be entered, click on the “Add” button.

**Figure 9: Assessment
Education Tab Screen**

Education Issues Section

The “Education Issues” section of the screen allows the worker to enter possible education issues the customer may have. The Financial Aid button provides access to the Free Application for Federal Student Aid (FAFSA) web site.

Step-by-Step:

- 16) If the participant has a limited English proficiency, indicate the primary language by double clicking in the “LEP/ESL” text box to receive the List of Values. Describe in the text box, any barriers the participant has because of their LEP/ESL.
- 17) Select the participant’s “Pell grant status” from the dropdown box. Enter the “Year” and “Amount” in the text boxes.

**Figure 10: Assessment
Education Tab Screen**

Licenses and Certificates Section

The “Licenses and Certificates” section of the screen lists “Certificates of Training and Licenses/Certificates” the customer may have. New records can be added here and will display on the Seeker screen. The “Additional” button is a pop-up that displays Additional Education records for education not related to a specific degree.

Step-by-Step:

- 18) To add additional “Training Completion Certificates”, enter the description of the Training Certificate” in the text box.
- 19) To enter additional “Licenses and Certificates”, select the type of License and/or certificate from the dropdown box. Enter the description of the License and/or Certificate in the text box. Enter the completion “Date” in the next text box. Double click in the “State” text box to receive the List of Values to enter the State abbreviation where the License and/or Certificate were received.
- 20) Click on “Save” button.

The Assessment Support System tab screen is used to enter information about the customer's family. Information entered on this screen will help the worker understand the customer's family situation including potential for support and any dangers that may be family related.

The screenshot shows the 'Assessment - KYLE W' window with the 'Support System' tab selected. The interface includes several sections with input fields and tables. Red callout boxes with numbers 1 through 10 point to specific areas:

- 1**: Points to the 'Childcare' section, specifically the 'Seeker Pregnant' checkbox and 'Due Date' field.
- 2**: Points to the 'Housing' section, specifically the 'Homeless in the last year' dropdown and 'Describe' text area.
- 3**: Points to the 'Transportation' section, specifically the 'What is your transportation?' text field.
- 4**: Points to the 'Drivers License' section, specifically the 'State' dropdown.
- 5**: Points to the 'Class' dropdown menu, which is currently set to 'B - Class CDL'.
- 6**: Points to the 'Describe' text area under the 'Household include children' section.
- 7**: Points to the 'Status' dropdown menu in the 'Drivers License' section.
- 8**: Points to the 'Additional Support Contacts' table, specifically the 'Type' column.
- 9**: Points to the 'Household Members' table, specifically the 'Relation' column.
- 10**: Points to the 'Save' button at the bottom right of the window.

At the bottom of the window, there is a status bar with the text: 'Has the customer ever been homeless? "Yes" or "No"'. The 'Save' button is highlighted with a yellow background, and the 'Cancel' button is highlighted with a red background.

Figure 11: Assessment Support System Tab Screen

Step-by-Step:

- 1) The **Child Care** and **Additional Support** section of the screen can be used to assess any childcare or other needs the customer has. Complete the following fields:
 - Seeker Pregnant
 - Due Date
 - Household include children
 - Need child care supportive services to participate
 - Describe need
 - Applied for Childcare?
 - Childcare Provider
 - What is your backup plan if provider is not available?
 - Any additional supports you need to be successful in employment/participation?

- 2) The **Housing** section of the screen provides current and past housing information. Complete the following fields:
 - Homeless in the last year? Describe situation
 - Current situation
 - Expect any changes in 90 days, describe.
- 3) The **Transportation** section of the screen allows the worker to enter transportation problems and solutions. Complete the following questions.
 - What is your transportation?
 - What is your backup plan if primary transportation is unavailable?
- 4) Enter the “State” the participant was issued a Drivers License.
- 5) Select the “Class” of Driver License from the dropdown box.
- 6) Enter any “Endorsements” that the participant has by double clicking on the text box to get a List of Values to choose from.
- 7) In the “Status” text box, describe the current status of the participant’s driver’s license and vehicle insurance.
- 8) The **Support Contacts** section of the screen can be used to identify individuals that may be able to help support the family.
- 9) The **Household Members** section of the screen can be used to enter information about the family members living in the household.
- 10) Click the “Save” button.

The **Assessment Financial Needs tab screen** is used to determine the customer's income and expenses.

The screenshot shows the 'Assessment - KYLE W ML' window with the 'Financial Needs' tab selected. The interface includes a top menu bar with tabs: Employment, Education, Support System, Financial Needs, Legal, Screening, Health/Treatment, and Basic Skills Tests. Below the menu, there are fields for 'Assessment Date: 03/13/08' and 'Last Update Date:'. A 'Comment' text box is present. To the right of the comment box are buttons for 'Copy', '+ Add', and '- Delete'. Below these is a field for 'Assessment Month Net Difference (Total Resources minus Expenditures): 0'. The main area is divided into two sections: 'Monthly Household Resources' and 'Monthly Household Expenditure'. Each section has a table with columns for 'Resource Type', 'Description', and 'Amount'. At the bottom of each table are 'Total Monthly Resources' and 'Total Monthly Expenditures' fields, each with '+ Add' and '- Delete' buttons. A 'Financial Education' checkbox is located between the two tables. At the bottom of the window are 'Print', 'Save', and 'Cancel' buttons. Red callout boxes with numbers 1 through 7 point to specific elements: 1 points to the 'Assessment Date' field; 2 points to the 'Comment' text box; 3 points to the 'Copy' button; 4 points to the 'Resource Type' column header in the 'Monthly Household Resources' table; 5 points to the 'Expenditure Type' column header in the 'Monthly Household Expenditure' table; 6 points to the 'Assessment Month Net Difference' field; and 7 points to the 'Save' button.

Figure 12: Assessment Financial Needs Tab Screen

Step-by-Step:

- 1) The **Assessment Month & Year** section of the screen can be used to enter the budget month and year. Click on the text box to enter the MM/YYYY.
- 2) Comments on the participant's financial situation can be added in the "Comment" text box.
- 3) The **Copy** button allows the worker to copy another month's budget information into the current month. After the information is copied it can be modified before it is saved. The **Add** and Delete buttons allow the worker to add new budget months or delete.
- 4) The **Monthly Household Resources** section of the screen is used to enter the resources the household has for a given month.
 - Identify the financial "Resource type" by double clicking on the text box to receive the List of Values.
 - Describe the resource type of earned income or alternative money in the "Description" text box.

- In the “Amount” text box, enter the anticipated monthly amount of the resource.
- 5) The **Monthly Household Expenditure** section of the screen is used to enter the expenses the household has for a given month.
 - Identify the “Expenditure type” by double clicking on the text box to receive the List of Values.
 - Describe the type of expenditures in the “Description” text box.
 - In the “Amount” text box, enter the monthly amount of the expense.
 - 6) In the “Assessment Month Net Difference” text box, the gross resource dollar amount minus expenditures will appear after the resources and expenditures are added.
 - 7) Click on the **Save** button

The **Assessment Screening tab screen** is used to determine if the customer has problems related to Substance Abuse or Domestic Violence. Unlike the rest of the Assessment screens, ask these questions exactly as they are written.

The screenshot shows a software interface titled "Assessment - KYLE W" with a user "LINDA L". The "Screening" tab is selected. The interface is divided into two main sections: "Substance Abuse Questions" on the left and "Domestic Violence Questions" on the right. Each section contains four questions with corresponding dropdown menus. Below these sections are fields for "Referred to Social Worker:" and "Date referred:", followed by a "Referral Form" button. At the bottom right are "Save" and "Cancel" buttons. A status bar at the bottom reads "Ask question as written, indicate 'Yes' or 'No' (LOV)".

Numbered callouts in the image:

- 1**: Points to the "Substance Abuse Questions" section.
- 2**: Points to the "Domestic Violence Questions" section.
- 3**: Points to the "Referred to Social Worker:" and "Date referred:" fields.
- 4**: Points to the "Save" button.

Figure 13: Assessment Screening Tab Screen

Step-by-Step:

- 1) The **Substance Abuse** section of the screen is used to ask the customer question about substance abuse. Complete the following fields:
 - In the past year have you felt you should Cut down on drinking or drug use?
 - In the past year have people Annoyed you by criticizing your drinking or drug use?
 - In the past year have you felt bad or Guilty about your drinking or drug use?
 - In the past year have you had a drink or drugs first thing in the morning (Eye opener) to steady nerves, rid a hangover, or get the day started?
- 2) The **Domestic Violence** section of the screen is used to ask the customer question about domestic violence. Complete the following fields:
 - In the past year have you felt Threatened or afraid of a partner in any way?

- In the past year have you been Annoyed by friends or family for criticizing about how your partner treated you?
 - In the past year have you Lost a friend or stopped associating with someone because of your partner?
 - In the past year have you been physically or Emotionally injured by a partner?
- 3) Select where the referral was made from the dropdown box. Enter today's date in the **Date-Referred** box and use the **Referral Form** button to create a referral and give to the customer.
 - 4) Click on the **Save** button

The **Assessment Health/Treatment tab screen** is used to enter information about the customer's health.

The screenshot shows a software interface for entering customer health information. At the top, there are tabs for Employment, Education, Support System, Financial Needs, Legal, Screening, Health/Treatment (selected), and Basic Skills Tests. Below the tabs, there are fields for Assessment Date (03/13/08) and Last Update Date. The main section is divided into three parts: Health, Insurance, and Treatments. The Health section contains several questions with dropdown menus and text input fields. The Insurance section has a dropdown for Insurance and a text field for Insurance type. The Treatments section includes a table for listing treatments with columns for Type, Start date, End date, Info Release, and Exp date. At the bottom right, there are Save and Cancel buttons. Red callout boxes with numbers 1 through 4 point to specific areas: 1 points to the Health section header, 2 points to the Insurance dropdown, 3 points to the Treatments table, and 4 points to the Save button.

Figure 14: Assessment Health/Treatment Tab Screen

Step-by-Step:

- 1) The **Health** section of the screen can be used to enter Health concerns about the customer. Complete the following fields:
 - Are you the primary caregiver for a disabled family member?
 - How does it affect your ability to gain or maintain employment?
 - Explain why your health conditions keep you from participating/working.
 - Have you applied for social security disability benefits? Date applied.
 - What is the status of your application?
 - Are you working with an advocate and/or lawyer? Name. Contact Number.
 - What work activities are appropriate based on your circumstances?
 - What type of work environment is best suited to your abilities?
- 2) The **Insurance** section of the screen can be used to enter Insurance information the customer has. Choose “Yes” or “No” to indicate status of the participant’s “Insurance”. From the dropdown box, select the “Insurance type” the participant has.
- 3) Use the **Treatments** section of the screen to enter any information about Treatments the customer may be receiving. Complete the following fields:

- Double click or F2 in the “Type” field to select type of treatment the customer is receiving. Use the “Add” button if you need to enter multiple treatment records.
 - Medical Verification, Date, End Date, and Follow up
 - Start date, end date, Information release, and Expiration date.
 - Describe the treatment activity that is recommended by the physician in the “Treatment description”.
 - Treatment facility.
 - Physician name, Phone, Ext. and Fax.
 - Therapists name, Phone, Ext. and Fax.
- 4) Click on the **Save** button

The Basic Skills Tests tab screen gives detailed information about Math, Reading and Writing tests taken / entered into the Toolbox 2 system.

Assessment - KYLE W MURPHY (###-##-####) | LINDA LUESCH (313) 31-2290

Employment | Education | Support System | Financial Needs | Legal | Screening | Health/Treatment | **Basic Skills Tests**

Math

Type	Test Date	Test Name	Case Manager	Location	Level	Score	Grade Equiv

+ Add - Delete

Reading

Type	Test Date	Test Name	Case Manager	Location	Level	Score	Grade Equiv

+ Add - Delete

Limited English Proficiency

Type	Test Date	Test Name	Case Manager	Location	Education Level/Test Score

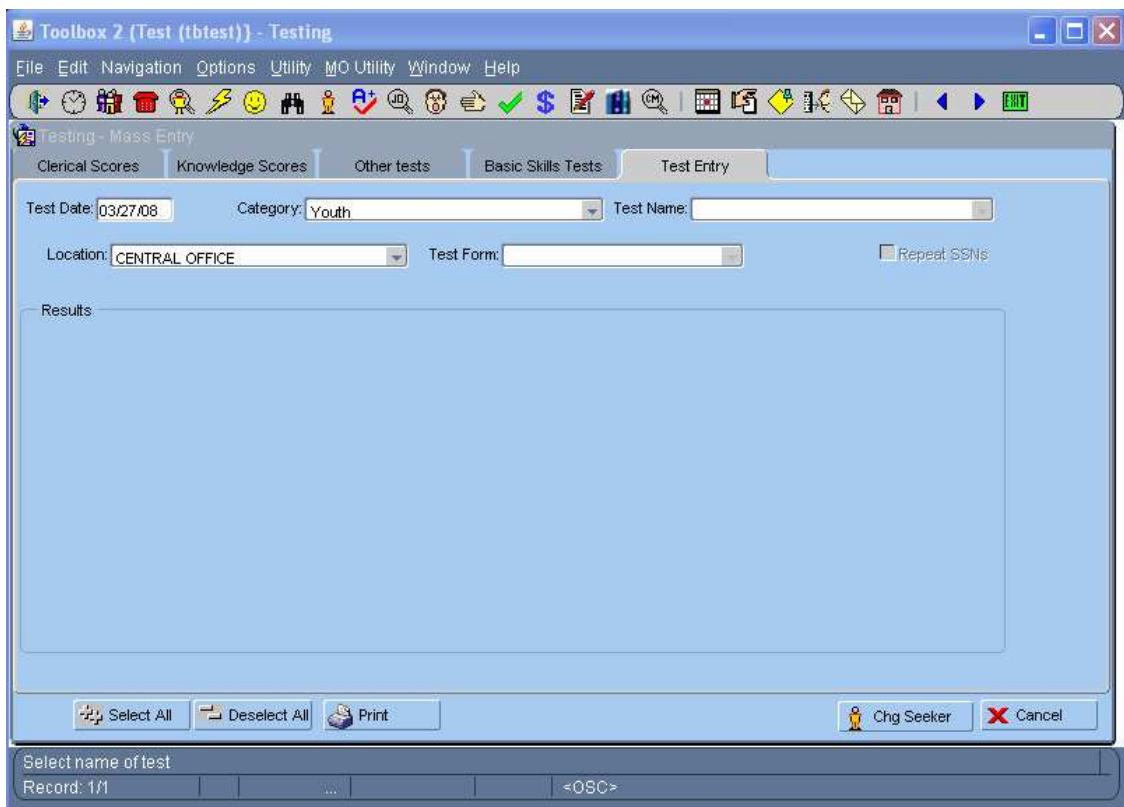
+ Add - Delete

3 Save X Cancel

*Figure 15: Assessment
Basic Skills Tests Tab Screen*


Step-by-Step:

- 1) Youth Scores allow the worker to see how the Youth customer is progressing in their **Math, Reading and Writing/Language** proficiency. Complete the following fields in the test (Math, Reading, and/or LEP) you have given:
 - Type
 - Test Date
 - Test Name
 - Case Manager
 - Location
 - Level
 - Score
 - Grade Equivalent
- 2) Tests can be entered on this screen or on the **Youth Scores** tab in the Testing section of the system. See *Figure 16*.
- 3) Click on the **Save** button

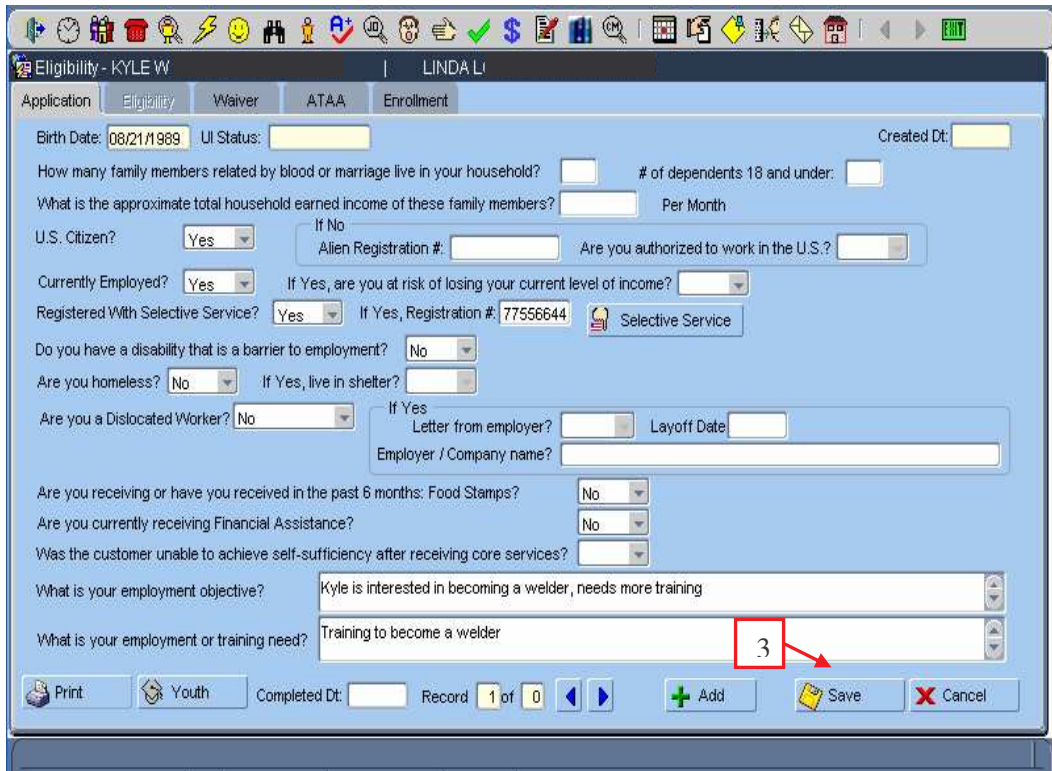


*Figure 16: Testing- Mass Entry
Youth Category Test Entry Screen*

Eligibility

Click on Eligibility Icon  from the Seeker Info page.

The Eligibility Application tab screen is used to enter general information about a customer that is being considered for training services. Most of this information could be populated if the job seeker completed the application on-line.



Eligibility - KYLE W | LINDA LI

Application | **Eligibility** | Waiver | ATAA | Enrollment

Birth Date: 08/21/1989 UI Status: Created Dt:

How many family members related by blood or marriage live in your household? # of dependents 18 and under:

What is the approximate total household earned income of these family members? Per Month

U.S. Citizen? Yes If No Alien Registration #: Are you authorized to work in the U.S.?

Currently Employed? Yes If Yes, are you at risk of losing your current level of income?

Registered With Selective Service? Yes If Yes, Registration #: 77556644 Selective Service

Do you have a disability that is a barrier to employment? No

Are you homeless? No If Yes, live in shelter?

Are you a Dislocated Worker? No If Yes Letter from employer? Layoff Date Employer / Company name?

Are you receiving or have you received in the past 6 months: Food Stamps? No

Are you currently receiving Financial Assistance? No

Was the customer unable to achieve self-sufficiency after receiving core services?

What is your employment objective? Kyle is interested in becoming a welder, needs more training

What is your employment or training need? Training to become a welder

Print Youth Completed Dt: Record 1 of 0 Add Save Cancel

Figure 17: Eligibility Application Screen

Step-by-Step:

- 1) Complete the text boxes that have not been pre-populated.
- 2) Anything entered on this screen does not change seeker screen.
- 3) Click on the **Save** button

Toolbox 2 (Test (tbtest)) - Eligibility

File Edit Navigation Options Utility MO Utility Window Help

Eligibility -

Application Eligibility Waiver ATAA Enrollment

Birth Date: 12/28/1992 UI Status: Created Dt: 03/27/08

How many family members related by blood or marriage live in your household? 3 # of dependents 18 and under: 1

What is the approximate total household earned income of these family members? 1000 Per Month

U.S. Citizen? Yes If No Alien Registration #: Are you authorized to work in the U.S.?

Currently Employed? Yes If Yes, are you at risk of losing your current level of income?

Registered With Selective Service? If Yes, Registration #: Selective Service

Do you have a disability that is a barrier to employment? No

Are you homeless? No If Yes, live in shelter?

Are you a Dislocated Worker? If Yes Letter from employer? Layoff Date

Employer / Company name:

Are you receiving or have you received in the past 6 months: Food Stamps? Yes

Are you currently receiving Financial Assistance? No

Was the customer unable to achieve self-sufficiency after receiving core services? No

What is your employment objective? Kyle is interested in becoming a welder, needs more training

What is your employment or training need? Training to become a welder

Print Youth Completed Dt: Record 1 of 1 Add Save Cancel

Record: 1/1 <OSC>

*Figure 18: Eligibility
Application Screen*

Step-by-Step:

- 1) If customer is a **Youth** (age 14 through 21) click on the youth button
- 2) The Youth Application Pop-up will appear. See *Figure 19*

The Youth questions help the worker determine problem areas that the customer may have. The answers to these questions will populate on the eligibility Barriers pop-up and determine if the customer is eligible for youth services.

Figure 19: Eligibility Youth Application Screen

Step-by-Step:

- 1) On the Youth Application pop-up screen complete the following fields before entering the application completion date.
 - Are you pregnant or parenting?
 - Are you a High School Graduate or Do you have a GED?
 - Are you a High School Dropout?
 - Are you a runaway?
 - Are you an offender?
 - Are you basic skills deficient?
 - Are you currently a foster child?
 - Are you a migrant youth?
 - Did you age out of foster care at age 18 or receive 1 year of TAL services after age 14?
 - Is one or both of your parents incarcerated?
 - Are you limited English proficient?
 - Do you lack occupational goals/skills?
 - Do you need assistance to complete an educational program, or to get a job?

- Are they one or more grade levels below that appropriate for their age?
 - Do you have chronic health problems including disabilities?
- 2) Enter the “Completion Date”. This will freeze the application so no changes can be made.
 - 3) Select the “Print” button to print a report of the application information.
 - 4) The customer must sign the printed application.
 - 5) Click on the “Save” button.

The Eligibility tab screen is used by the worker to determine if a customer meets the eligibility requirements for training programs. Some of the information on this screen is pre-populated from the seeker screens and eligibility application and does not have to be entered.

Figure 19: Eligibility Eligibility Screen

Step-by-Step:

- 1) As information is entered into the specific sections the box next to the Program will become highlight in green. When the program box becomes highlighted the eligibility rules for this program have been met.
- 2) The program is not considered as eligible until the program box is highlighted in green and has a check in it. The “check” is populated when the case manager clicks the “Check Verification” button and checks off all the items that they have verified.
- 3) When the desired programs are highlighted in green and the box(s) are checked the case manage enters “today’s date” in the “Eligibility Verification Date” text box. This freezes the record. The eligible programs populate on the “Enrollment” screen in the Eligible Enrollments section.
- 4) Click on the “Save” button.

**Figure 19: Eligibility
Youth Barriers Pop-up Screen**

Step-by-Step:

- 1) Select the “Barriers” button on the “Eligibility” screen.
- 2) The “Youth Barriers” pop-up screen opens. This screen must be completed before the customer is eligible for Youth program services. This pop-up will not be available if the customer is not a Youth.
- 3) The answers on this pop-up are pre-populated from the Youth Application. If changes need to be made the worker can make the changes on this screen.
- 4) The left column shows “Youth Barriers” while the right column has the “Youth at Risk” questions. If any of the answers in the Youth at Risk column are answered “yes” the “Youth at Risk” box at the top of the screen will be checked.
- 5) Click on the “Save” button

The screenshot shows a 'Check Verification' window with two tabs: 'General' and 'Youth'. The 'General' tab is active. It contains several sections with checkboxes and text input fields. Red boxes with numbers 1 through 5 point to specific elements: 1 points to the 'General' tab, 2 points to the 'Identity' checkbox, 3 points to the 'Family Size' checkbox, 4 points to the 'To be completed' text box, and 5 points to the 'Save' button. The 'Identity' section includes checkboxes for 'Identity', 'Citizenship / Employment Status', 'Age', 'Disability Status', and 'Veteran Status', each with a note in parentheses. Below these is a 'To be completed' text box. The 'WMA / WMA Adult / Youth' section has checkboxes for 'Family Size', 'Last 6 Months Income', 'Selective Service', and 'Categorically Eligible'. Below this is another 'To be completed' text box. The 'WMA Dislocated Worker / NEG' section has checkboxes for 'Dislocated Worker Status' and 'Layoff Date', with a note '(See Eligibility Guidelines)'. Below this is a third 'To be completed' text box. The 'Displaced Homemaker' section has checkboxes for 'Income' and 'Meets All Three Definitions', with a list of criteria below. At the bottom right are 'Save', 'Cancel', and 'Close' buttons. The bottom status bar shows 'Record: 1/1' and '<OSC>'.

Figure 20: Eligibility
General Check Verification Pop-up Screen

Step-by-Step:

- 1) The “Check Verification General” pop-up screen opens when the case manager selects the “Check Verification” button on the Eligibility screen. This screen must be completed before the customer is eligible for program services.
- 2) “Check” the boxes for the documents received from the customer that is required to verify information such as “Identity”, “Citizenship”, and/or “Age”.
- 3) If a box is grayed out the case manager cannot check the box since there is not a need to verify that information.
- 4) After each section there is a free format text box that the case manager must complete if boxes in that section were checked.
- 5) Click on the “Save” button.

Check Verification

General **Youth**

☐ Pregnant or Parenting
(-ie. Physician's Note, Birth Certificate, School Records)

☒ **Foster Child**
(-ie. Written Statement, Court documentation)

☐ Homeless
(-ie. Written Statement from shelter or Individual)

☐ Dropout
(-ie. Attendance Record, Statement from school)

☐ Runaway
(-ie. Written Statement, Court documentation)

☒ **Offender**
(-ie. Court documents, Letter from Police Officer)

☐ Basic Skill Deficient
(-ie. Generally Accepted Standardized Test School Records)

☐ One or more grade levels below appropriate for age
(-ie. Generally Accepted Standardized Test School Records)

☐ Youth at Risk

☐ Migrant Youth
(-ie. Statement from Agency, applicant/parent statement)

☐ Foster Care
(-ie. Written statement State/local agency)

☐ Incarcerated Parent
(-ie. Court documents)

☐ School Behavior Problems
(-ie. School Records)

☐ Family Literacy problems
(-ie. Applicant Statement/Parental Statement)

☒ **Domestic Violence**
(-ie. Statement from school, mental health or medical provider or parental statement)

☐ Substance Abuse
(-ie. Statement from substance abuse treatment, medical or mental health provider)

☐ Limited English Proficient
(-ie. School assessment)

☐ Lack Occupational goals/skills
(-ie. School records/assessment, Applicant statement)

☐ Chronic Health-Disabilities
(-ie. Statement from medical, mental health, provider, school special education dept)

Seeking help

Save Cancel Close

Record: 1/1 ... <OSC>

**Figure 21: Eligibility
Youth Check Verification Pop-up Screen**

Step-by-Step:

- 1) The “Youth Check Verification” pop-up opens when the worker selects the “Youth” tab. This screen must be completed before the customer is eligible for Youth program services. This tab will not be available if the customer is not a Youth.
- 2) “Check” the boxes for the documents received from the customer that is required to verify information such as “Identity”, “Citizenship”, and/or “Age”.
- 3) If a box is grayed out the case manager cannot check the box since there is not a need to verify that information.
- 4) After each section there is a free format text box that the case manager must complete if boxes in that section were checked.
- 5) Click on the “Save” button

The Eligibility Enrollment tab screen is used to enroll customers in programs they are eligible and qualify for.

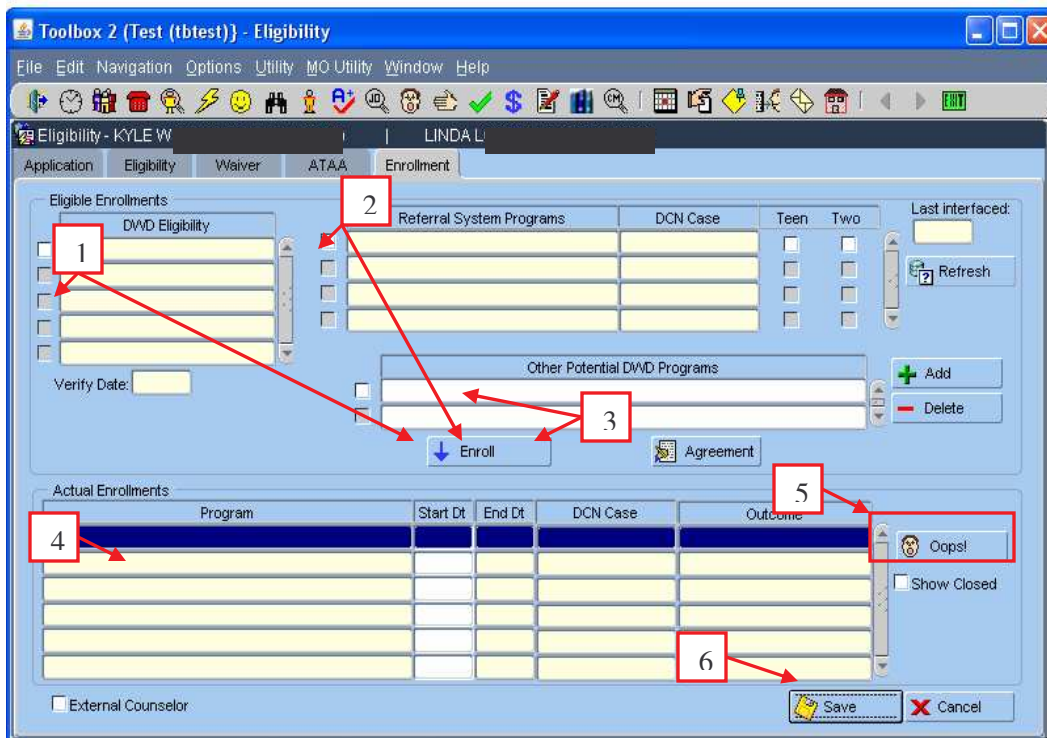


Figure 22: Eligibility Enrollment Screen

Step-by-Step:

- 1) “DWD Eligibility” section lists programs that the customers have passed the eligibility requirements. Determine if the customer is appropriate to participate. Programs show in this section after eligibility has been determined in Toolbox 2. Check the box next to the program and click on the “Enroll” button to enroll.
- 2) “Referral System Programs” section displays referrals from other system that have determined eligibility for programs. Check the box next to the program and click on the “Enroll” button to enroll customers in this program.
- 3) “Other Potential Programs” section lists are programs that do not require use of the Eligibility screen or a partner system to determine eligibility. Check the box next to the program and click on the “Enroll” button to enroll.
- 4) The “Actual Enrollments” section shows the program(s) the customer is actually enrolled in.
- 5) The “Oops!” button can be used to un-enroll an actual enrollment when an enrollment has been enrolled in error. The “Oops” button only works the day the enrollment is made.
- 6) Click on the “Save” button

Use the **Employment Plan- Appropriateness screens** to determine if the customer is appropriate for training programs. This screen must be completed before the system will allow any training money to be used.

Toolbox 2 (Test (tbtest)) - Employment Plan

File Edit Navigation Options Utility MO Utility Window Help

Enrollment Appropriateness Employment Plan Progress Closures

General Specific 2

1

Is the customer unable to achieve self-sufficiency/suitable employment in intensive services based on program requirements? (Adult only) N/A Kyle is currently working part-time at McDonalds and will need to find housing of his own.

Have other educational grant opportunities been explored? Yes Kyle has been approved for a Pell Grant

Is the customer able to complete the selected training? Yes Based on the assessment, it appears that Kyle is willing and able to complete his training

Does the customer have a reasonable expectation of employment following completion of training? Yes LMI shows that there is a great need for welders. Kyle should not have any trouble securing employment.

Is the customer willing to complete the training or education as quickly as possible, taking into account individual needs, time limits and circumstances? Yes Kyle will be going to training during the day and continue to work part-time in the evenings.

Is the training available at a reasonable cost and location? (Trade only) N/A Training will be done in town and will be on the bus line.

3

Completed Date: 03/14/08 Training Services must be added to plan by: 06/12/08 Record 1 of 1 + Add Save Cancel

Transaction complete: 1 records applied and saved.
Record: 1/1 <OSC>

*Figure 23: Employment Plan
Appropriate General Screen*

Step-by-Step:

- 1) Answer “Yes”, “No” or “N/A” for each of the six questions on the Appropriateness – General screen and then complete the information next to the question.
- 2) Click on the “Appropriateness – Specific” tab and complete screen before entering the completed date and freeze the record. See **Figure 24**
- 3) Click on the “Save” button

Use the **Employment Plan Appropriateness – Specific tab screen** to enter additional information relating to the customers training appropriateness.

The screenshot shows the 'Employment Plan - Specific' screen in the 'Toolbox 2 (Test (ttest)) - Employment Plan' application. The screen has a menu bar (File, Edit, Navigation, Options, Utility, MO Utility, Window, Help) and a toolbar. The 'Employment Plan' tab is selected, and the 'Specific' sub-tab is active. The main area contains three text boxes for barriers to employment and training, each with a label: 'If applicable, describe how Age is a barrier to employment and training', 'If applicable, describe how Appearance is a barrier to employment and training', and 'If applicable, describe how Attitude is a barrier to employment and training'. A red box labeled '1' points to the first text box. Below these is a 'Completed Date' field with the value '03/14/08' and a 'Training Services must be added to plan by' field with the value '06/12/08'. A red box labeled '2' points to both date fields. At the bottom right are 'Add', 'Save', and 'Cancel' buttons. A red box labeled '3' points to the 'Save' button. The status bar at the bottom shows 'Record: 1/1' and '<OSC>'.

**Figure 24: Employment Plan
Appropriate Specific Screen**

Step-by-Step:

1. Complete the text boxes under the three additional appropriateness questions. Those questions are:
 - If applicable, describe how Age is a barrier to employment and training.
 - If applicable, describe how Appearance is a barrier to employment and training.
 - If applicable, describe how Attitude is a barrier to employment and training.
2. Enter the “Completed Date” and the “Training Services must be added to plan by” date will populate. If training services need to be entered after the date this screen will need to be completed again.
3. Click on the “Save” button.

Employment Plan tab screen

The screenshot shows the 'Employment Plan' tab in the 'Toolbox 2 (Test (tbtest))' application. The form is for 'KYLE' and includes the following fields and buttons:

- 1: Start Date (03/14/08)
- 2: O*NET (51-4121.03)
- 3: Goal (To obtain training to be a welder)
- 4: Justification (To obtain job as a welder and find own apartment)
- 5: Objective (Assessment)
- 6: Task (Meet at training site to fill out application for enrollment)
- 7: Outcome
- 8: Save button

Buttons on the right include 'Add Service', 'Comments', 'Verification', 'Add Task', 'Del Task', and 'Del Service'. The bottom status bar shows 'Record: 1/1' and '<OSC>'.

*Figure 25: Employment Plan
Employment Plan Screen*

Step-by-Step:

1. Enter a "Start Date".
2. Enter an "O*NET" code by double clicking on the text box. The O*NET codes chosen in the registration under the "Desired Job Titles" will appear. If new O*NET codes are needed, click the cancel button and there will be a prompt to choose from all O*NET codes.
3. Enter an "Employment Goal" in the text box.
4. Enter a "Justification" to explain the employment plan goal in the text box.
5. Enter an "Objectives" and a "Services" by double clicking in the text box for a list of values. Use "Objectives" and "Services" to build the outline of the plan. Objectives/Services can be closed when the customer has completed all the tasks related to the objective/service. Click the "Add Service" or "Del Service" buttons to add or delete objectives/services.
6. Once Objectives and Services are selected; a "Task" text box will appear. "Tasks" allow more specific detail about how the customer will meet each Objective/Service. Tasks are used to detail how the customer will achieve each section of their employment plan. Tasks can be set as completed (Y) or not completed (N). Click the "Add Task" or "Del Task" buttons to add or delete tasks.
7. Enter "End Date" and "Outcome" to close.
8. Click on the "Save" button

The **Employment Plan- Progress tab screen** is used to follow-up and plan monitoring that must occur when customers are involved in training programs.

The screenshot shows the 'Employment Plan - KYLE' window with the 'Progress' tab selected. The window has a menu bar (File, Edit, Navigation, Options, Utility, MO Utility, Window, Help) and a toolbar. Below the menu bar are tabs for Enrollment, Appropriateness, Employment Plan, Progress, and Closures. The main area is titled 'Progress Evaluation Notes' and contains a table with columns: Date, Subject, Counselor, and Flw-Dt. Below the table are buttons for Select All, Deselect All, Print, and Add. The 'Schools' section has a dropdown for School Name (currently 'NICHOLS CAREER CENTER-NIC...') and a text field for Training Program (currently 'Welding Program'). There are also checkboxes for 'Show Completed' and 'Add'/'Delete' buttons. The 'Actual Start Date' is set to '03/10/08' and 'Projected Completion' is '07/01/08'. The 'Actual Completion' field is empty. At the bottom right are 'Save' and 'Cancel' buttons. A status bar at the bottom shows 'Record: 1/1' and '<OSC>'. Numbered callouts point to: 1. Schools section, 2. Training Program field, 3. Actual Start Date field, 4. Projected Completion field, 5. Add button, and 6. Save button.

Figure 26: Employment Plan Progress Screen

Step-by-Step:

1. The “Schools” section of the screen displays the “School Name” where the training is provided.
2. Enter “Training Program” the customer is in.
3. Enter the “Actual Start Date”.
4. Enter the “Projected Completion” date.
5. Once training is completed, enter the “Actual Completion dates”.
6. Click on the “Save” button

The **Employment Plan-Closures tab screen** provides Worker's the ability to close Services, Enrollments and the Employment Plan from one screen.

The screenshot shows the 'Employment Plan - KYLE W' window with the 'Closures' tab selected. The interface includes several sections: 'Services', 'Employment Plan', 'Enrollments', and 'File Location'. Numbered callouts indicate key areas: 1 points to the 'Services' table; 2 points to the 'Employment Plan' section; 3 points to the 'Enrollments' table; 4 points to the 'File Location' and 'Archive Comments' fields; and 5 points to the 'Save' button.

Service	Start	End	Outcome	Closure Comments
Formal Assessment	03/14/08			

Employment Plan Start Date	End Date	Reason	Plan Close Comments
03/14/08			

Program	Start	End	Outcome	Comments

File Location: Archive Comments:

Save Cancel

Figure 27: Employment Plan Closures Screen

Step-by-Step:

1. The "Services" section displays all of the open services for the current employment plan.
2. The "Employment Plan" section only displays the employment plan start date. To close the plan, enter the End Date and Reason for closure. The Plan Closure Comments field is optional and Reason is selected from a list (LOV). Employment plans cannot be closed if there are open services.
3. The "Enrollments" section displays all of the open enrollments. To see closed enrollments click the "Show Closed Services" box. To close enrollment enter an End Date and Outcome. The Comments field is optional and Outcomes are selected from a list of values.
4. The "File Location and Archive Comments" section is used to identify the location of cases. The information aide's workers looking for case file that closed in the past and now are re-opening.
5. Click on the "Save" button.